User Manual คู่มือการใช้งาน

TotalSMEs Point Of Sale System

(ระบบค้าปลีก)

Overseaonline Co., Ltd.
199/4 ถนนรัชดาภิเษก (ท่าพระตากสิน) แขวงบุคคโล เขตธนบุรี กรุงเทพมหานคร 10600

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ระบบค้าปลีก

TotalSMEs POS System

--- Overseaonline Co., Ltd.

คำนำ

Overseaonline Co., Ltd.., ก่อตั้งขึ้นในปี 1999 ที่กรุงเทพฯ （เป็นนักพัฒนาซอฟต์แวร์อิสระ）Overseaonline Co., Ltd.

มีผู้เชี่ยวชาญระดับสูงในการบริหารและทีมงานระดับมืออาชีพของวิศวกรซอฟต์แวร์ 10 กว่าปีที่ผ่านมา Overseaonline Co., Ltd.. มีความมุ่งมั่นในการพัฒนาซอฟแวร์สำหรับระบบค้าปลีก, การวิจัยและพัฒนาเทคโนโลยีสารสนเทศและการประยุกต์ใช้, เป็นหนึ่งในจำนวนเล็กน้อยของซอฟแวร์ค้าปลีกและการเงินที่พัฒนาโดยเทคโนโลยีใหม่ๆทางคอมพิวเตอร์ (Cloud Computering Technology) ให้ ใช้ในกลุ่มซูเปอร์มาร์เก็ตห้างสรรพสินค้าร้านและอื่น ๆ ที่จะให้คำปรึกษา การดำเนินงานตามโครงการ การบำรุงรักษาระบบ การฝึกอบรมอาชีพและบริการ และการอัปเดตเต็มรูปแบบอื่น ๆ TotalSMEs ซอฟแวร์ระบบการค้าปลีกและระบบการเงินรองรับหลายภาษา : ภาษาจีน -- ไทย – ภาษาอังกฤษ TotalSMEs ซอฟแวร์ จะยังคงทำงานร่วมกันกับพันธมิตรเพื่อให้มีต้นทุนต่ำและแก้ปัญหาอย่างมีประสิทธิภาพ

“TotalSMEs ซอฟแวร์ระบบค้าปลีก” พัฒนาโดย Overseaonline Co., Ltd. ด้วยประสบการณ์ในอุตสาหกรรมจากการวิจัยและการพัฒนาซอฟต์แวร์การจัดการธุรกิจยุคใหม่ ทั้งระบบแบ่งออกเป็น 2 ส่วน คือ ระบบค้าปลีก และระบบการบริหารเพื่อจัดการระบบค้าปลีก ฟังก์ชั่นหลักรวมถึงการจัดการระบบ, เกี่ยวกับแฟ้มข้อมูลการจัดซื้อการจัดการการขาย, การจัดการคลังสินค้า, ค้าปลีก, การวิเคราะห์ทางสถิติ, ข้อมูลและอื่น ๆ

ไดเร็กทอรี :

ส่วนแรกของการติดตั้งซอฟแวร์ (1 ถึง 5)

ส่วนที่สองของซอฟต์แวร์ - การลงทะเบียน (1)

ส่วนที่สองของซอฟต์แวร์ - การจัดการการดำเนินงาน (1-7)

ส่วนแรกของการติดตั้งซอฟแวร์

แพลตฟอร์มระบบ

แพลตฟอร์มระบบ	เหมาะสำหรับทุกระบบปฏิบัติการ Windows!
ฐานข้อมูล	ฐานข้อมูลขนาดใหญ่ของตนเอง - MySQL

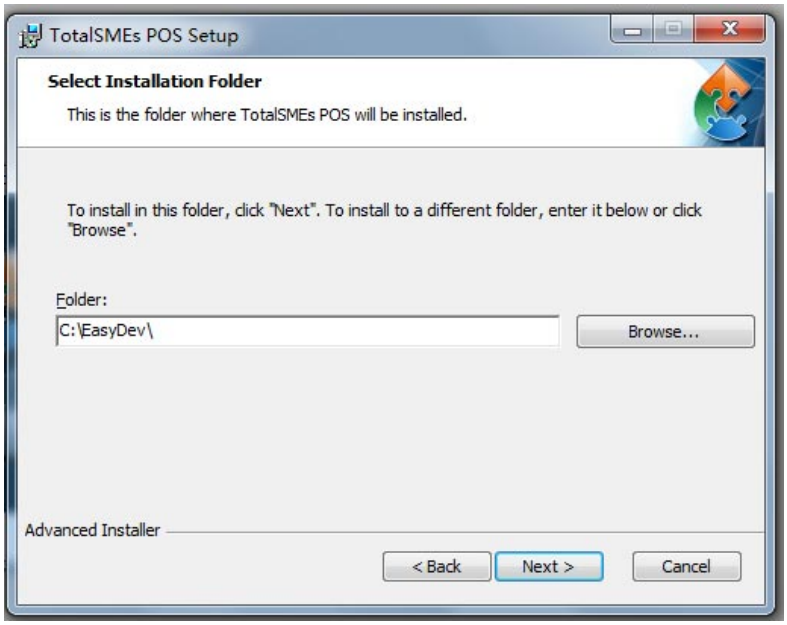
ความต้องการของระบบ

PC	เครื่องคอมพิวเตอร์ที่รองรับ (PIII300 หรือมากกว่า, Ram2G, HD 50G ขึ้นไป)

อุปกรณ์ สแกนเนอร์บาร์โค้ด, เครื่องพิมพ์บาร์โค้ด, ลิ้นชักเก็บเงิน(Cash Drawer)

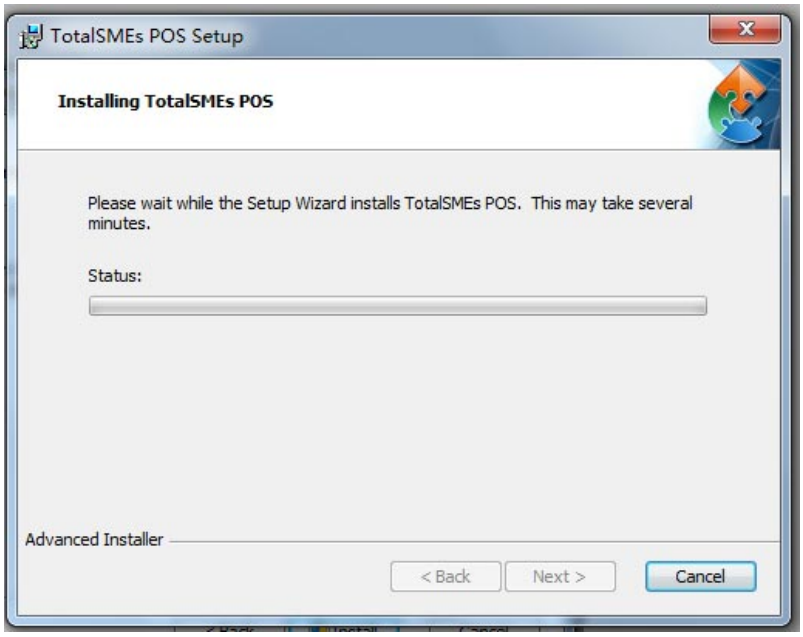
1. ไป http://www.TotalSMEs .com ดาวน์โหลดระบบ ค้าปลีก -- TotalSMEs_POS.msi
2. คลิกเพื่อติดตั้ง “TotalSMEs_POS.msi” คลิกเ “Next” ภาพ 1

2. คลิก “Next” ภาพ2



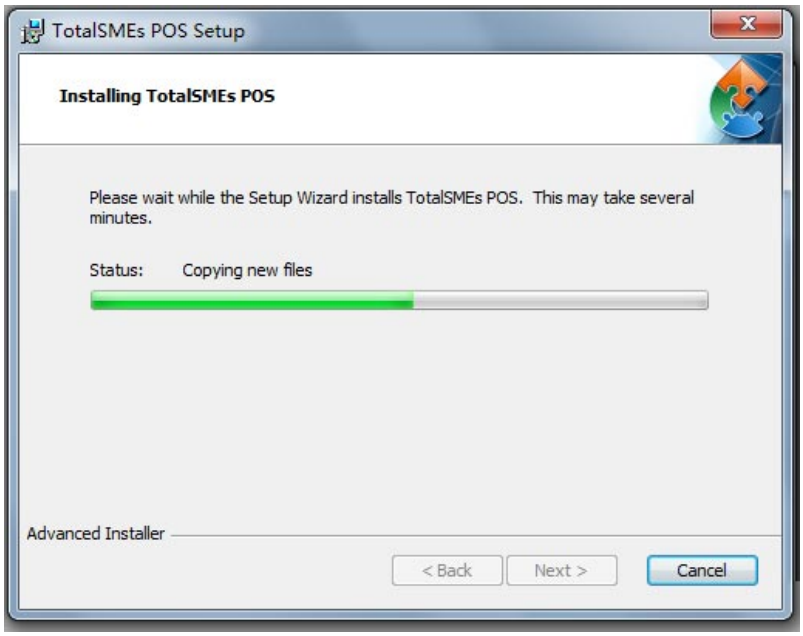
หมายเหตุ : ชื่อของโฟลเดอร์ไม่สามารถเปลี่ยนแปลงได้ แต่สามารถเปลี่ยนแปลงการจัดเก็บข้อมูลลงฮาร์ดดิสก์ได้!

3. คลิก “Next” ภาพ3

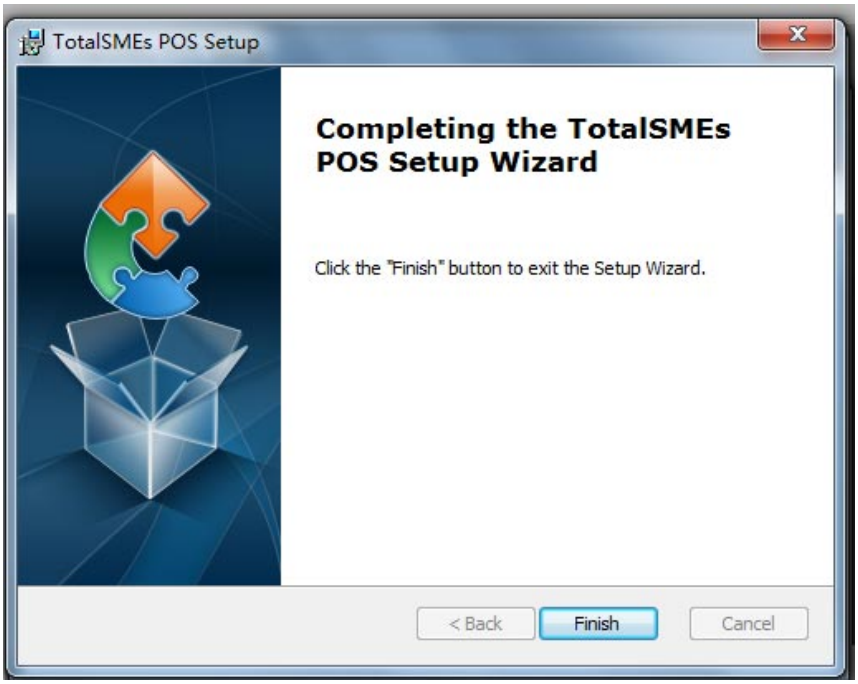


4. **คลิก** “Install”

ระบบจะแจ้งเกี่ยวกับระบบการรักษาความปลอดภัยให้เลือก
"Yes" **ระบบจะเริ่มการติดตั้ง ...**



5. **คลิก** “Finish”



ส่วนที่สองของซอฟต์แวร์ - การลงทะเบียน

1. กลับไปที่ Desktop ให้คลิก ภาพ Icon “TotalSMEs POS “

ALSMES POS USER MANUAL

TOTALSMES POS USER MANUAL

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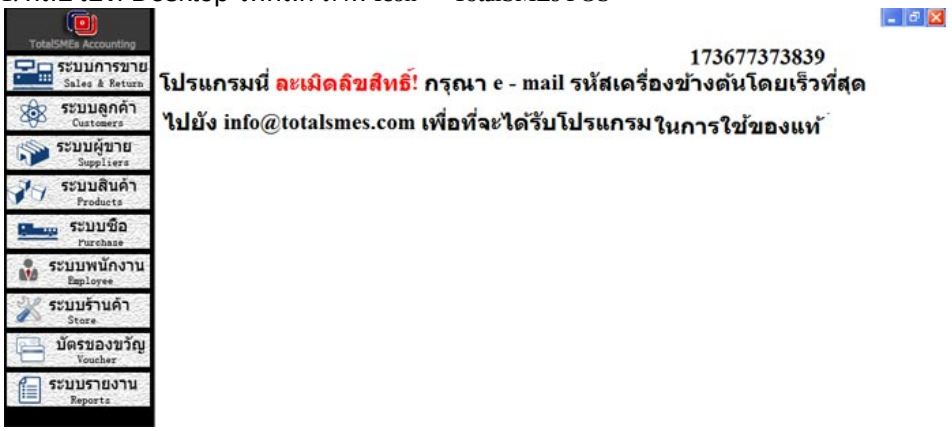
2 Introduction

2.1 Loggin

1. กลับไปที่ Desktop ให้คลิก ภาพ Icon “TotalSMEs POS “



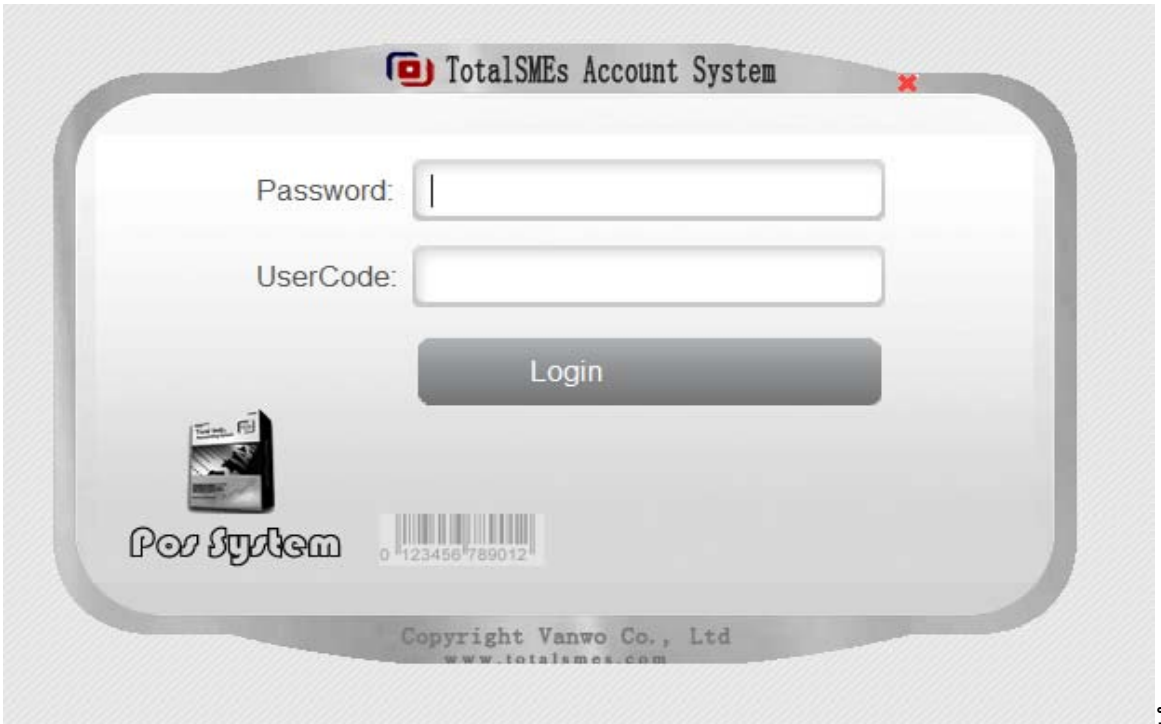
เจ้าหน้าที่ของเราหลังจากได้รับรหัสเครื่องของคุณ จะส่งใบอนุญาตการปรับรุ่นแพกเกจ ให้คุณ

ส่วนที่สองของซอฟต์แวร์ - การจัดการการดำเนินงาน (1-7)

ผู้ดูแลระบบ (ชื่อผู้ใช้ : 6931256602110 รหัสผ่าน : 11111111)

การตั้งค่าระบบการดูแลรักษาผู้ประกอบการและการจัดการข้อมูลและอื่น ๆ ข้อมูลบริษัท , การจัดการลูกค้า, การจัดการผู้จัดจำหน่ายผลิตภัณฑ์การจัดการสินค้า, การจัดการผู้ประกอบการรวมถึงข้อมูลส่วนตัวของผู้ประกอบการ, จัดการสิทธิในการตั้งค่ารหัสผ่าน, การจัดการข้อมูลรวมทั้งการสำรองข้อมูล, การกู้คืนข้อมูล และบัตรของขวัญ และอื่น ๆ

ให้คลิก ภาพ Icon “TotalSMEs POS “ เข้าสู่ระบบ



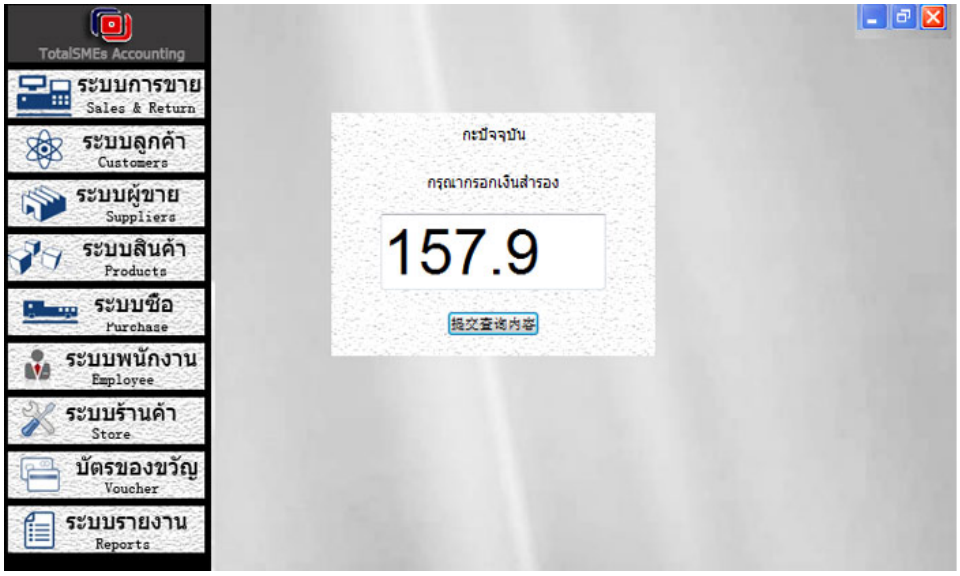
ป

ภาพ1:

一. ผู้ดูแลระบบ

ผู้ดูแลระบบหลังจากเข้าสู่ระบบ, ระบบจะเปิดลิ้นชักเก็บเงินอัตโนมัติและให้ใส่เงินสำรอง

ภาพ2:



หลังจากส่งข้อมูลเงินสำรองแล้วระบบจะเข้าสู่ระบบการขาย ซึ่งสามารถใช้ Shortcut ในการขายได้

รายละเอียด Shortcut สามารถดูรายละเอียดได้ตามด้านล่างของหน้า

2.2 Home screen

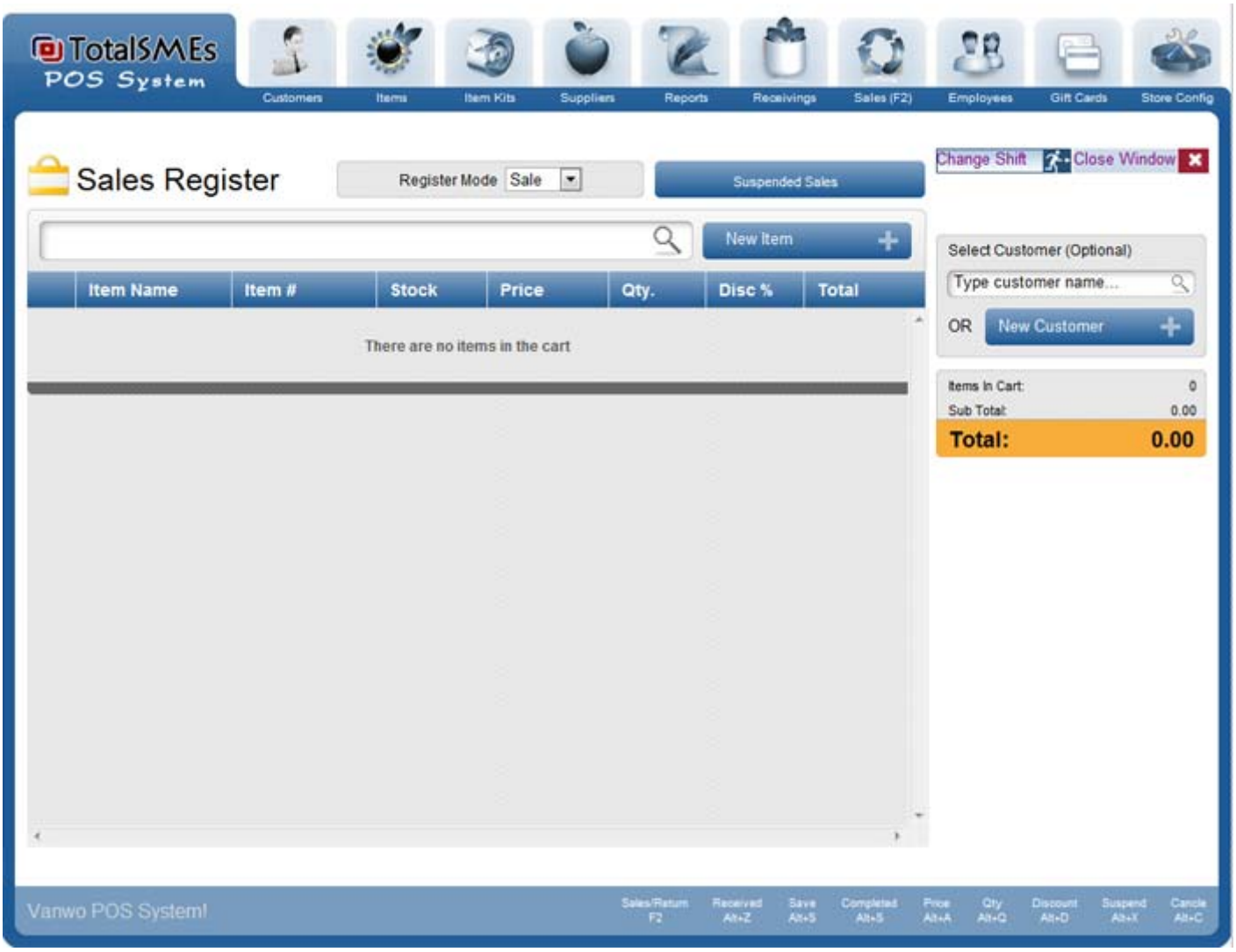


Figure 6 – Home Overview

This is the home screen that will be shown after a successful login. The home screen contains:

i. All the menus and a short description about the menu.
ii. Date and time information – will be displayed in all screen.
iii. Logged on user's name.
iv. Logout button - Users can logout from any screen by clicking the logout button which is located in the bottom left of the screen.
v. Software version.

CHAPTER3:

Customers

3 Customers

3.1 Creating a new customer

1. To create new customer, click the “New Customer” button which looks like the figure below.

Figure 7 – New Customer Button

2. Then a pop up box will be shown. Fill in the necessary information for the customer. **(The fields in red are required)**

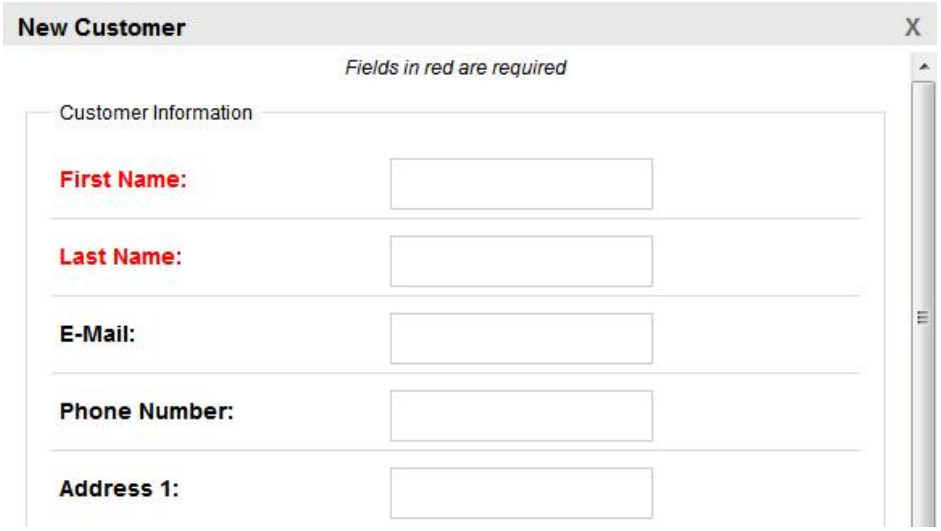


Figure 8 – New Customer Pop Up Box

3. Then scroll down and click the “Submit” button which is in the bottom left of the pop out box.

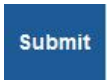


Figure 9 – Submit Button

4. Once submitted, the system will notify the user and save the customer to the database.

Figure 10 – System Notification

3.2 Editing a customer

1. To edit a customer, click the “edit” button which looks like the figure below.

Figure 11 – Editting From Customer Table

2. Then a pop out box will be shown. Edit the necessary information and click

the submit button (refer step 2 and 3 in page 23 for further details)

3. Once submitted, the system will notify the user and update the customer to the database.

Figure 12 – Sytem Notification

3.3 Deleting a customer

1. To delete a customer, select the customer by clicking on their name or the check box provided.

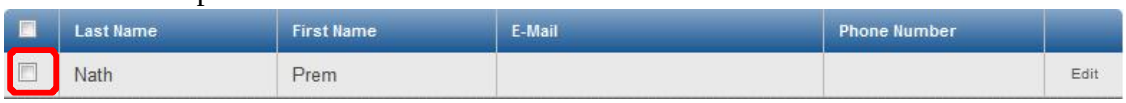


Figure 13 – Deleting From Customer Table

2. Then click on the “Delete” button to delete the customer.

Figure 14 – Delete Button

3. Once deleted, the system will notify the user and delete the customer from the customer table.

Figure 15 – System Notification

3.4 Import customers from Microsoft Excel

1. To import customers from a excel sheet, click the “Excel Import” button.

Figure 16 – Excel Import Button

2. A pop out box will be shown. Click “Download Import Excel Template (CSV)” link to download a template of the excel file that is compatible with TotalSMEs Pos

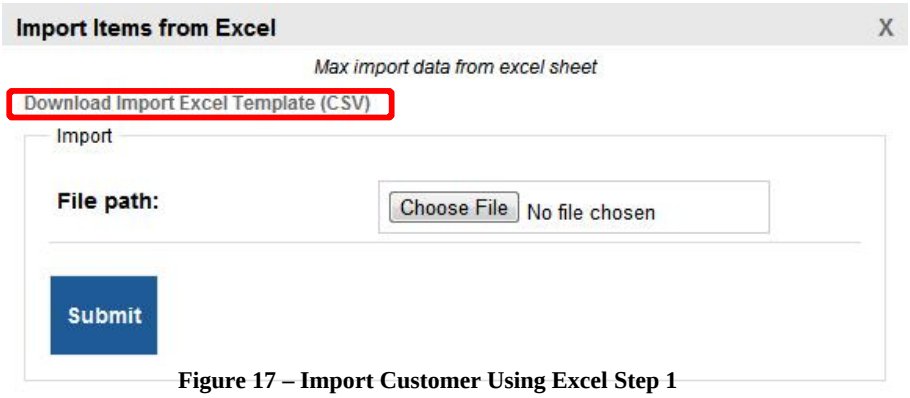


Figure 17 – Import Customer Using Excel Step 1

3. Then open the “import_customers.csv” that was downloaded. Fill in the customer information and save the file.
4. Then browse the file by clicking “Choose file” and select the excel file.

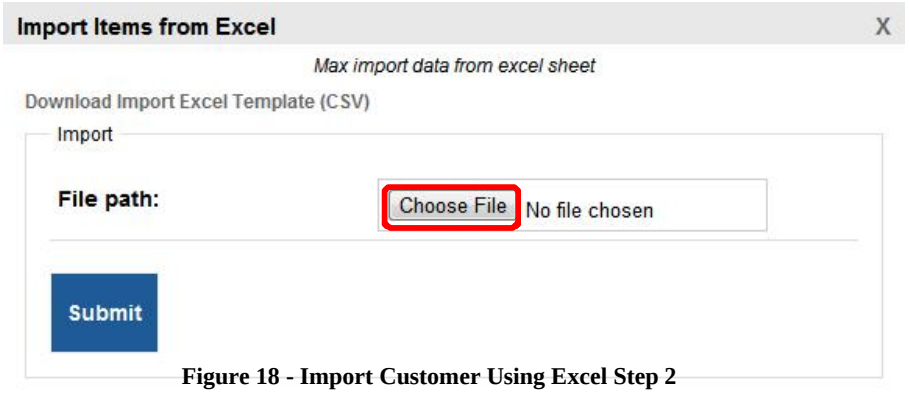


Figure 18 - Import Customer Using Excel Step 2

5. Once imported, the system will notify the user and add the customer to the database.

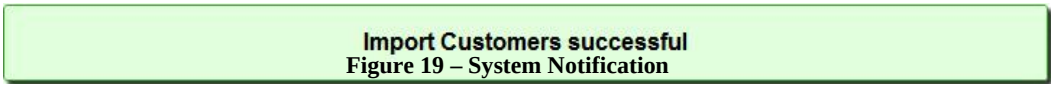


Figure 19 – System Notification

CHAPTER3:

Items

4 Items

4.1 Creating a new item

1. To create new item, click the "New Item" button which looks like the figure below.

Figure 20 – New Item Button

2. Then a pop up box will be shown. Fill in the necessary information for the item. **(The fields in red are required)**

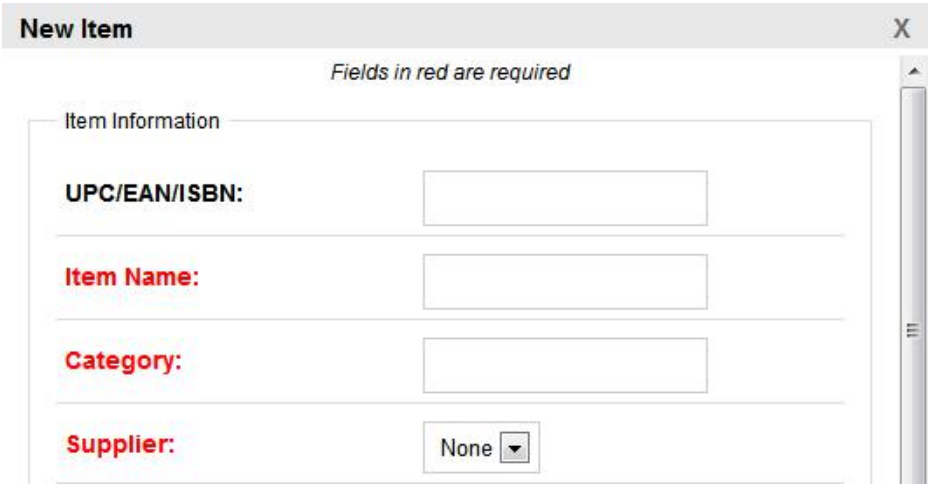


Figure 21 – New Item Pop Out Box

3. Then scroll down and click the "Submit" button which is in the bottom left of the pop out box.

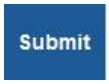


Figure 22 – Submit Button

4. Once submitted, the system will notify the user and save the item to the database.

Figure 23 – System notification

4.2 Editing an item

1. To edit an item, click the “edit” button which looks like the figure below.

Figure 24 – Editting From Item Table

2. Then a pop out box will be shown. Edit the necessary information and click

the submit button (refer step 2 and 3 in page 27 for further details)

3. Once submitted, the system will notify the user and update the item to the database.

Figure 25 – System Notification

4.3 Deleting an item

1. To delete an item, select the item by clicking on the item name or the check box provided.

Figure 26 – Deleting From Item Table

2. Then click on the “Delete” button to delete the item.

Figure 27 – Delete Button

3. Once deleted, the system will notify the user and delete the item from the items table.

Figure 28 – System Notification

4.4 Import item from Microsoft Excel

1. To import item from a excel sheet, click the “Excel Import” button.

Figure 29 – Excel Import Button

2. A pop out box will be shown. Click “Download Import Excel Template (CSV)” link to download a template of the excel file that is compatible with TotalSMEs Pos

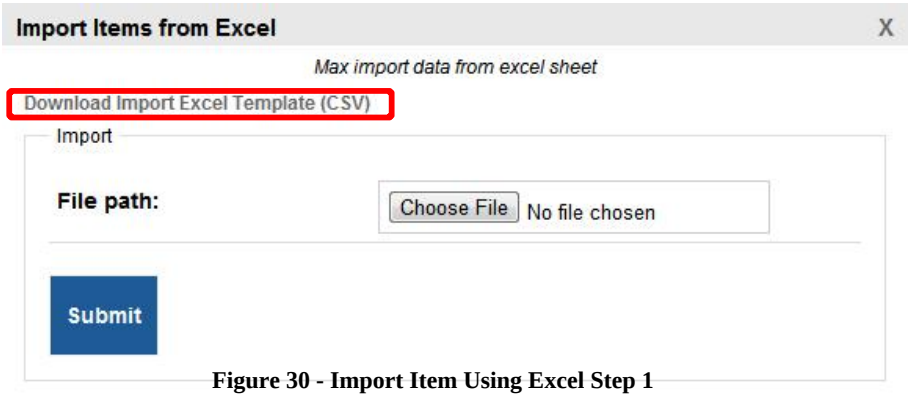


Figure 30 - Import Item Using Excel Step 1

3. Then open the “import_items.csv” that was downloaded. Fill in the items information and save the file.
4. Then browse the file by clicking “Choose file” and select the excel file.

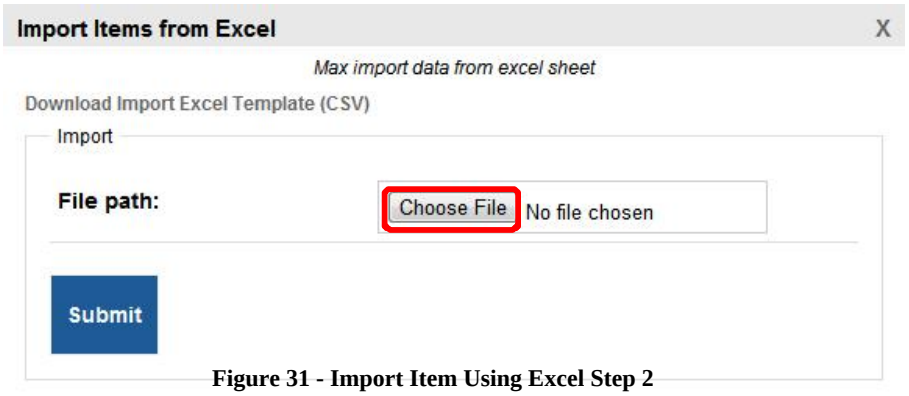


Figure 31 - Import Item Using Excel Step 2

5. Once imported, the system will notify the user and add the items to the database.

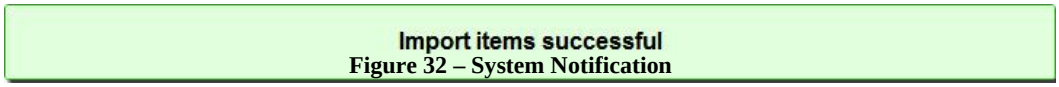


Figure 32 – System Notification

4.5 Generating a barcode for an item

1. To generate barcode for an item, select the item by clicking on the item name or the check box provided.

Figure 33 – Generate Barcode From Item Table

2. Then click on the "Generate Barcodes" button to generate the barcode.

Figure 34 – Generate Barcode Button

3. Once generated, a new window/tab will be opened to display the display

Figure 35 – Sample Barcode

CHAPTER5:

ItemKit

5 Item kit

An item kit is used to group two or more items together. For example, item “burger”, “fries” and “soft drinks” can be added into the item kit “meal”. By doing this, the user can easily key-in the item kit to the sales.

5.1 Creating a new item kit

1. To create new item kit, click the “New Item Kit” button which looks like the figure below.

Figure 36 – New Item Kit Button

2. Then a pop up box will be shown. Add as many items as needed, followed by the quantity. Then fill in the other necessary information for the item kit. **(The fields in red are required)**.

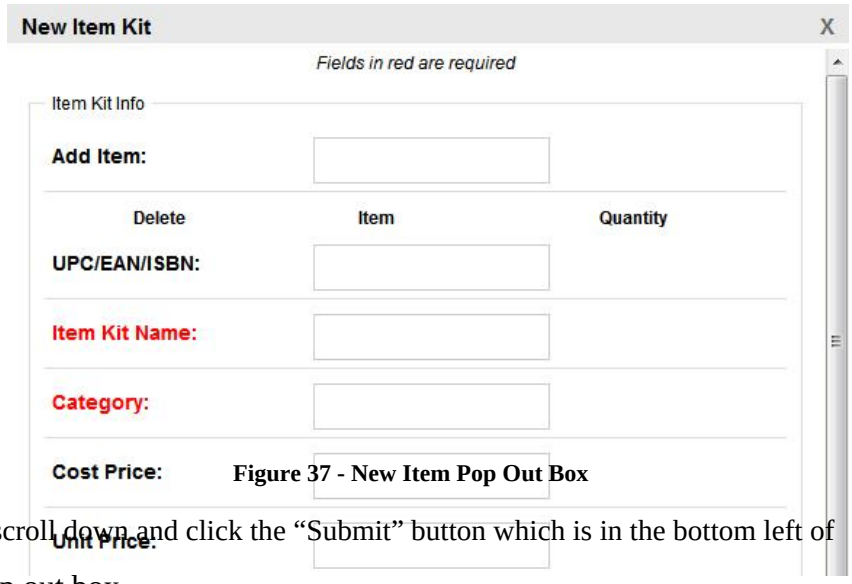


Figure 37 - New Item Pop Out Box

3. Then scroll down and click the “Submit” button which is in the bottom left of the pop out box.

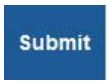


Figure 38 – Submit Button

4. Once submitted, the system will notify the user and save the item kit to the database.

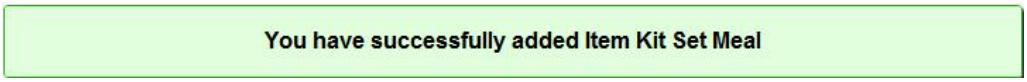


Figure 39 – System Notification

5.2 Editing an item kit

4. To edit an item kit, click the “edit” button which looks like the figure below.

Figure 40 – Editting From Item Kit Table

5. Then a pop out box will be shown. Edit the necessary information and click

the submit button (refer step 2 and 3 in page 32 for further details)

6. Once submitted, the system will notify the user and update the item kit to the database.

Figure 41 – System Notification

5.3 Deleting an item kit

4. To delete an item kit, select the item kit by clicking on the item kit name or the check box provided.

Figure 42 – Deleting From Item Kit Table

5. Then click on the “Delete” button to delete the item kit.

Figure 43 – Delete Button

6. Once deleted, the system will notify the user and delete the item kit from the item kit table.

Figure 44 – System Notification

5.4 Generating a barcode for an item kit

4. To generate barcode for an item kit, select the item kit by clicking on the item kit name or the check box provided.

Figure 45 - Generate Barcode From Item Kit Table

5. Then click on the "Generate Barcodes" button to generate the barcode.

Figure 46 – Generate Barcode Button

6. Once generated, a new window/tab will be opened to display the display

Figure 47 – Sample Barcode

CHAPTER6:

Suppliers

6 Suppliers

6.1 Creating a new supplier

1. To create new supplier, click the "New Supplier" button which looks like the figure below.

Figure 48 – New Supplier Button

2. Then a pop up box will be shown. Add as many items as needed, followed by the quantity. Then fill in the other necessary information for the item kit. **(The fields in red are required)**.

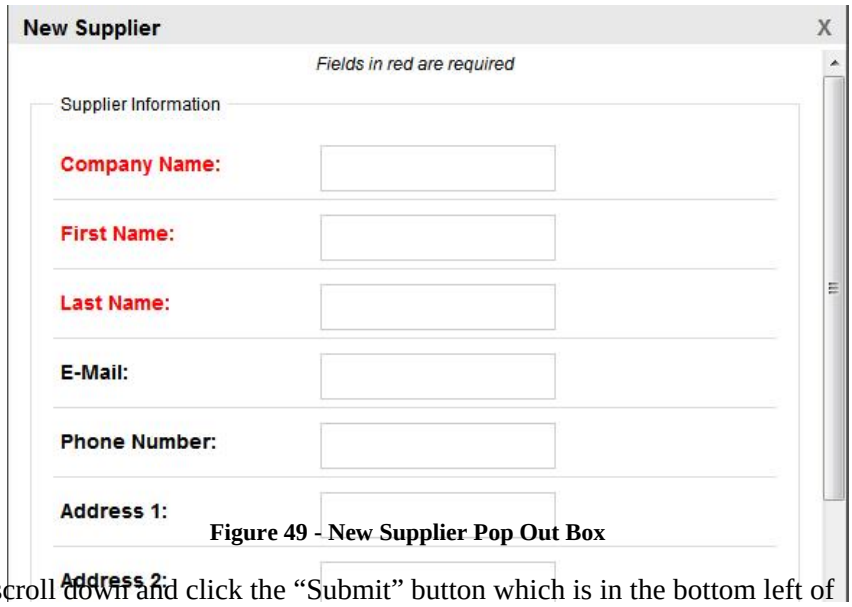


Figure 49 - New Supplier Pop Out Box

3. Then scroll down and click the "Submit" button which is in the bottom left of the pop out box.

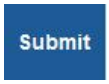


Figure 50 – Submit Button

4. Once submitted, the system will notify the user and save the supplier to the database.

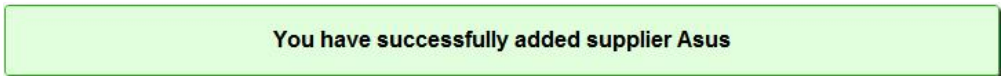


Figure 51 – System Notification

6.2 Editing a supplier

1. To edit a supplier, click the “edit” button which looks like the figure below.

Figure 52 – Editing From Supplier Table

2. Then a pop out box will be shown. Edit the necessary information and click the submit button (refer step 2 and 3 in page 38 for further details)

3. Once submitted, the system will notify the user and update the supplier to the database.

Figure 53 – System Notification

6.3 Deleting a supplier

1. To delete a supplier, select the item kit by clicking on the supplier name or the check box provided.

Figure 54 – Deleting From Supplier Table

2. Then click on the “Delete” button to delete the supplier.

Figure 55 – Delete Button

3. Once deleted, the system will notify the user and delete the supplier from the supplier table.

Figure 56 – System Notification

CHAPTER7:

Reports

7 Reports

The system is capable to produce three (3) types of report. Those are graphical report, summary report and detailed report. The reports are based on customers, employees, sales, categories, discounts, items, item kits, payments, suppliers, taxes, receivings, inventory and deleted sales.

7.1 Graphical Reports

In this example, the sales graphical report will be generated.

1. To create a graphical report, click the "Graphical Report" button which looks like the figure below.

Figure 57 – Graphical Report Button

2. The next screen that this shown will allow user to select the date range and sale type. Once it is selected to the desired option, then click the submit button to produce the report.

Figure 58 – Date Range

3. The generated chart would look like the Figure 74 on the next page.

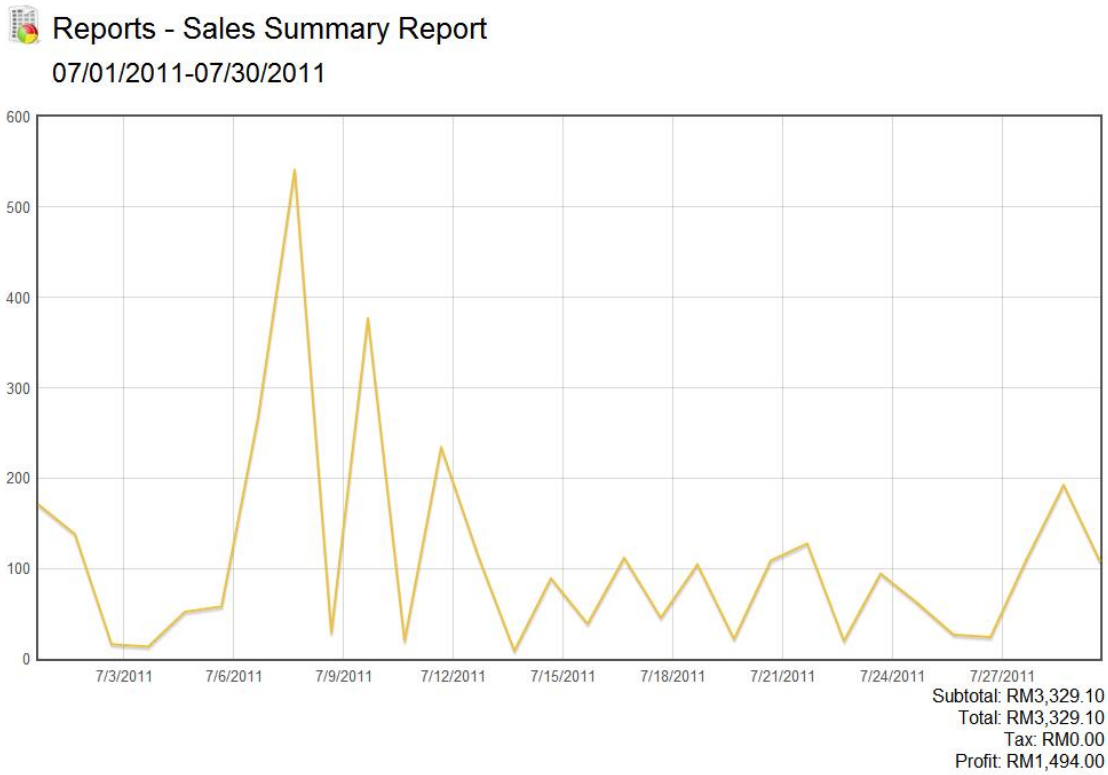


Figure 59 – Sample Graphical Report

4. Generation of other graphical report follows the exact step as this one.

7.2 Summary Reports

In this example, the sales summary report will be generated.

1. To create a summary report, click the "Summary Report" button which looks like the figure below.

Figure 60 – Summary Report Button

2. The next screen that this shown will allow user to select the date range, sale type and the option to export to Microsoft Excel. Once it is selected to the desired option, then click the submit button to produce the report. Refer figure 76 on the next page

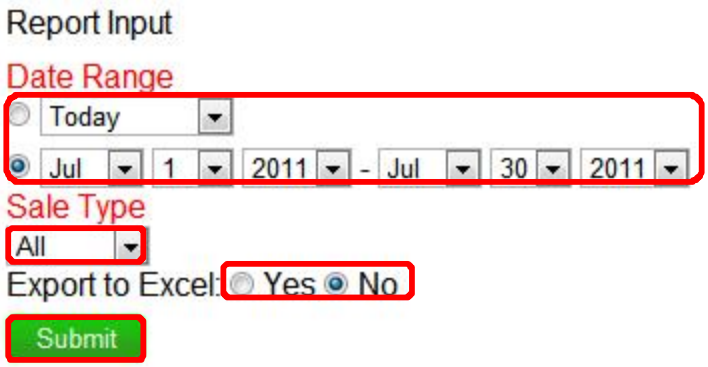


Figure 61 – Date Range

3. The generated chart would look like the Figure 77.

Reports - Sales Summary Report
07/01/2011-07/12/2011

Date	Subtotal	Total	Tax	Profit
2011-07-01	RM170.90	RM170.90	RM0.00	RM45.90
2011-07-02	RM138.10	RM138.10	RM0.00	RM138.10
2011-07-03	RM16.10	RM16.10	RM0.00	RM5.50
2011-07-04	RM13.50	RM13.50	RM0.00	RM13.50
2011-07-05	RM52.00	RM52.00	RM0.00	RM52.00
2011-07-06	RM57.90	RM57.90	RM0.00	RM53.40
2011-07-07	RM267.30	RM267.30	RM0.00	RM107.30
2011-07-08	RM541.20	RM541.20	RM0.00	RM96.20
2011-07-09	RM29.30	RM29.30	RM0.00	RM19.30
2011-07-10	RM377.00	RM377.00	RM0.00	RM92.00
2011-07-11	RM20.00	RM20.00	RM0.00	RM20.00
2011-07-12	RM234.30	RM234.30	RM0.00	RM4.30

Subtotal: RM1,917.60
Total: RM1,917.60
Tax: RM0.00
Profit: RM647.50

Figure 62 – Sample Summary Report

7.3 Detailed Reports

In this example, the detailed summary report will be generated.

1. To create a detailed report, click the “Detailed Report” button which looks like the figure below.

Figure 63 – Detailed Report Button

2. The next screen that this shown will allow user to select the date range, sale type and the option to export to Microsoft Excel. Once it is selected to the desired option, then click the submit button to produce the report. Refer figure 79.

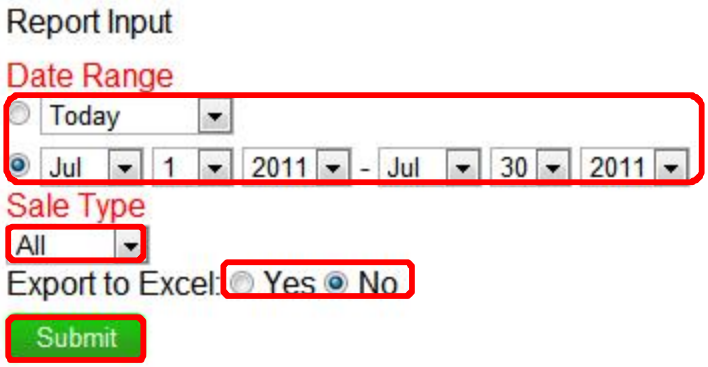


Figure 64 – Date Range

3. The generated chart would look like the Figure 77. The +/- sign on the left will display/hide the detailed report of that particular sale.

Figure 65 – Sample Detailed Report

CHAPTER8:

ItemReceiving

8 Item Receiving

Item receivings are used during restock of the items. The supplier's name details are added optionally to the receipt.

8.1 Item Receiving

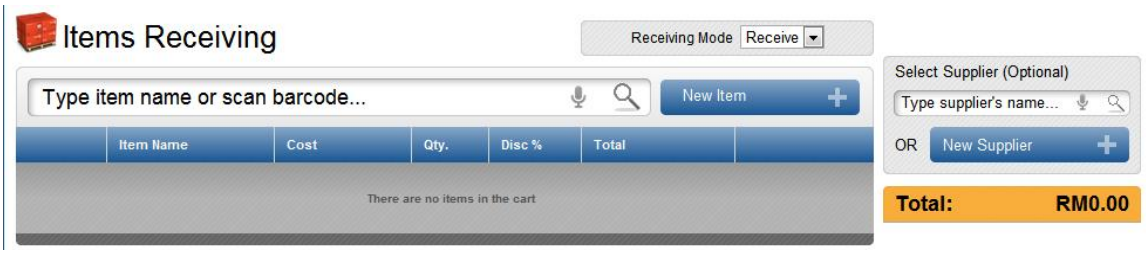


Figure 66 – Item Receiving Screen

1. To create a receiving statement/receipt, type the item's name or scan the barcode of the item.
2. Then select the supplier's name by typing the name or hitting the backspace to get a list of existing suppliers. (This step is optional)
3. After filling in the required items, the page will look like Figure 82.

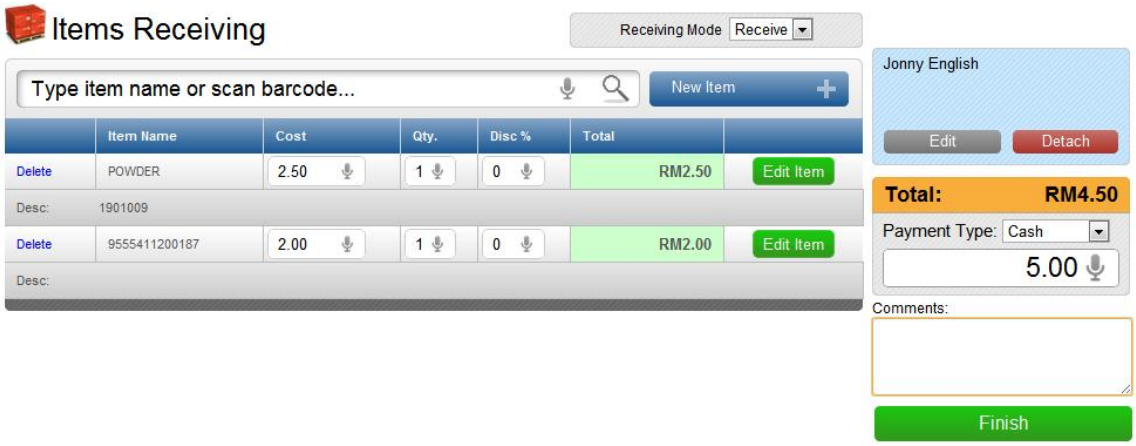


Figure 67 – Completing Item Receiving Sale

4. Then enter the payment type and click finish to complete the transaction. Once transaction is complete, a receipt will be printed automatically.

CHAPTER9:

Sales

9 Sales

The sales screen is one of the frequently used screens in the system. It is use to conduct and complete a sale with receipt.

9.1 Completing a successful sale

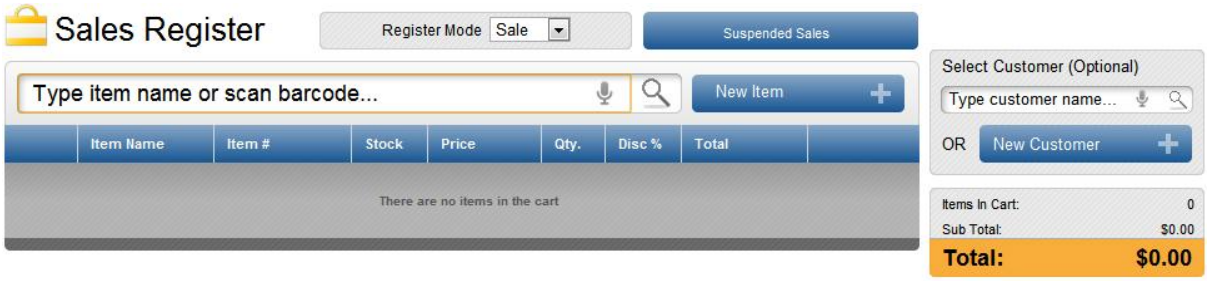


Figure 68 – Sales Register Screen

1. To create a sale, type the item's name or scan the barcode of the item.
   Tip: Hitting the backspace will provide the list of all items

2. To edit price and quantity, simply fill in the price and quantity and click update.

3. Then choose the payment mode from the combobox provided and enter the amount given by the customer. Then click add payment

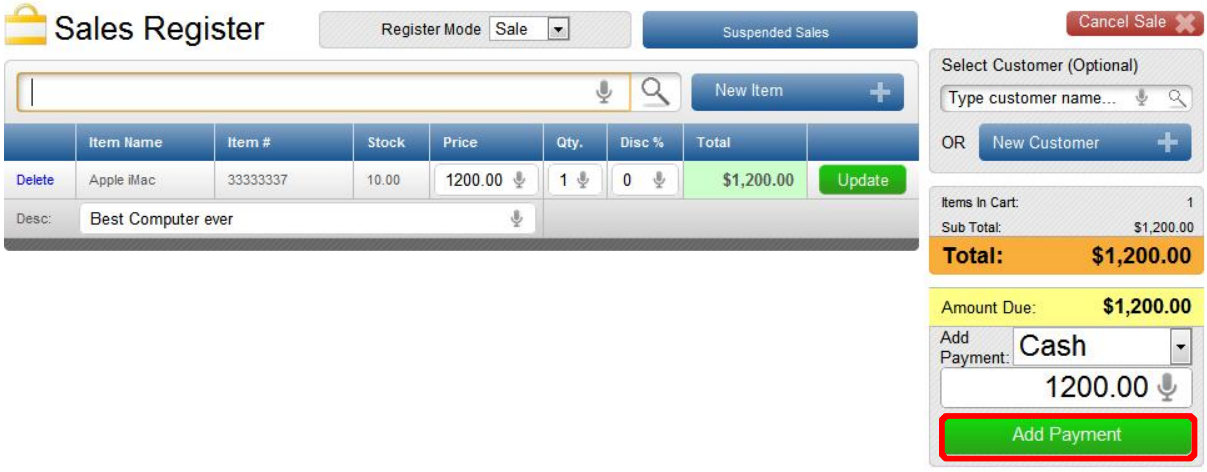


Figure 69 – Adding Payment to sale

4. Once the payment has been added, click complete sale on the next screen. (Refer Figure 85 on the next page).

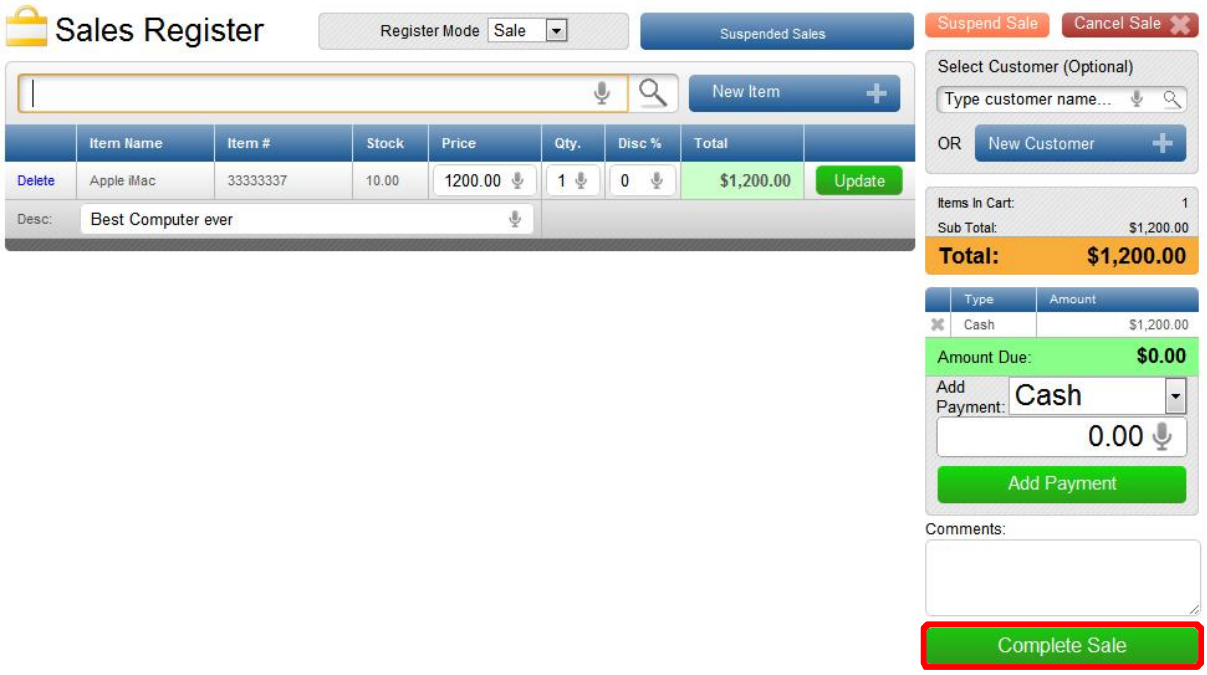


Figure 70 – Completing a sale

6. Once transaction is complete, a receipt will be printed automatically. The

receipt will look like the Figure 86 below.

CHAPTER10:

Employees

10 Employees

10.1 Creating an ewemployee

1. To create new employee, click the "New Employee" button which looks like the figure below.

Figure 72 – New Employee Button

2. Then a pop up box will be shown. Fill in the necessary information for the employee and check the boxes to grant access to specific modules. **(The fields in red are required)**

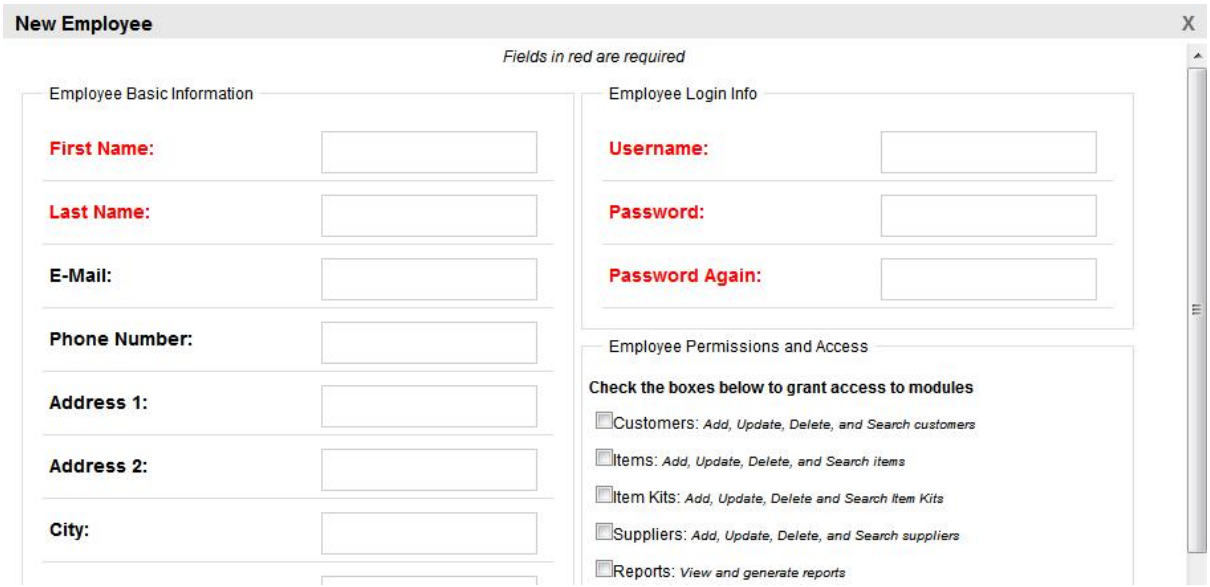


Figure 73 – New Employee Pop Up Box

3. Then scroll down and click the "Submit" button which is in the bottom right of the pop out box.

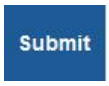


Figure 74 – Submit Button

4. Once submitted, the system will notify the user and save the employee to the database.

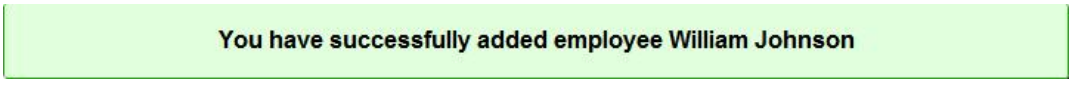


Figure 75 – System Notification

10.2 Editing an employee

1. To edit an employee, click the “edit” button which looks like the figure below.

Figure 76 – Editing From Employee Table

2. Then a pop out box will be shown. Edit the necessary information and click

the submit button (refer step 2 and 3 in page 52 for further details)

3. Once submitted, the system will notify the user and update the employee to the database.

Figure 77 – System notification

10.3 Deleting an employee

1. To delete an employee, select the employee by clicking on their name or the check box provided.

Figure 78 – Deleting From Employee Table

2. Then click on the “Delete” button to delete the employee.

Figure 79 – Delete Button

3. Once deleted, the system will notify the user and delete the employee from the employee table.

Figure 80 – System Notification

CHAPTER11:

GiftCards

11 GiftCards

A gift card can be used to pay instead of cash if sufficient amount of credit is in the card. The card can be loaded by a user in few simple steps.

11.1 Creating a giftcard

1. To create new item kit, click the "New Giftcard" button which looks like the figure below.

Figure 81 – New Giftcard Button

2. Then a pop up box will be shown. Then fill in the value and card number for the gift card. **(The fields in red are required)**.

Figure 82 - New Employee Pop Up Box

3. Then click the "Submit" button which is in the bottom left of the pop out box.

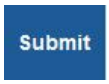


Figure 83 – Submit Button

4. Once submitted, the system will notify the user and save the gift card to the database.

Figure 84 – System Notification

11.2 Editing a giftcard

1. To edit a gift card, click the “edit” button which looks like the figure below.

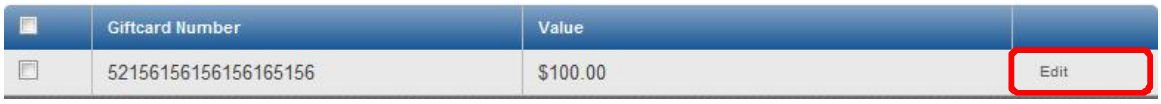


Figure 85 – Editing From Gift Card Table

2. Then a pop out box will be shown. Edit the necessary information and click the submit button (refer step 2 and 3 in page 55 for further details)

3. Once submitted, the system will notify the user and update the gift card to the database.

Figure 86 – System Notification

11.3 Deleting a giftcard

1. To delete a gift card, select the gift card by clicking on the gift card number or the check box provided.

Figure 87 – Deleting From Gift Card Table

2. Then click on the “Delete” button to delete the gift card.

Figure 88 - Delete Button

3. Once deleted, the system will notify the user and delete the gift card from the gift card table.

Figure 89 – System Notification

11.4 Generating a barcode for a giftcard

1. To generate barcode for a gift card, select the gift card by clicking on the gift card's number or the check box provided.

Figure 90 - Generate Barcode From Gift Card Table

2. Then click on the "Generate Barcodes" button to generate the barcode.

Figure 91 – Generate Barcode Button

3. Once generated, a new window/tab will be opened to display the display

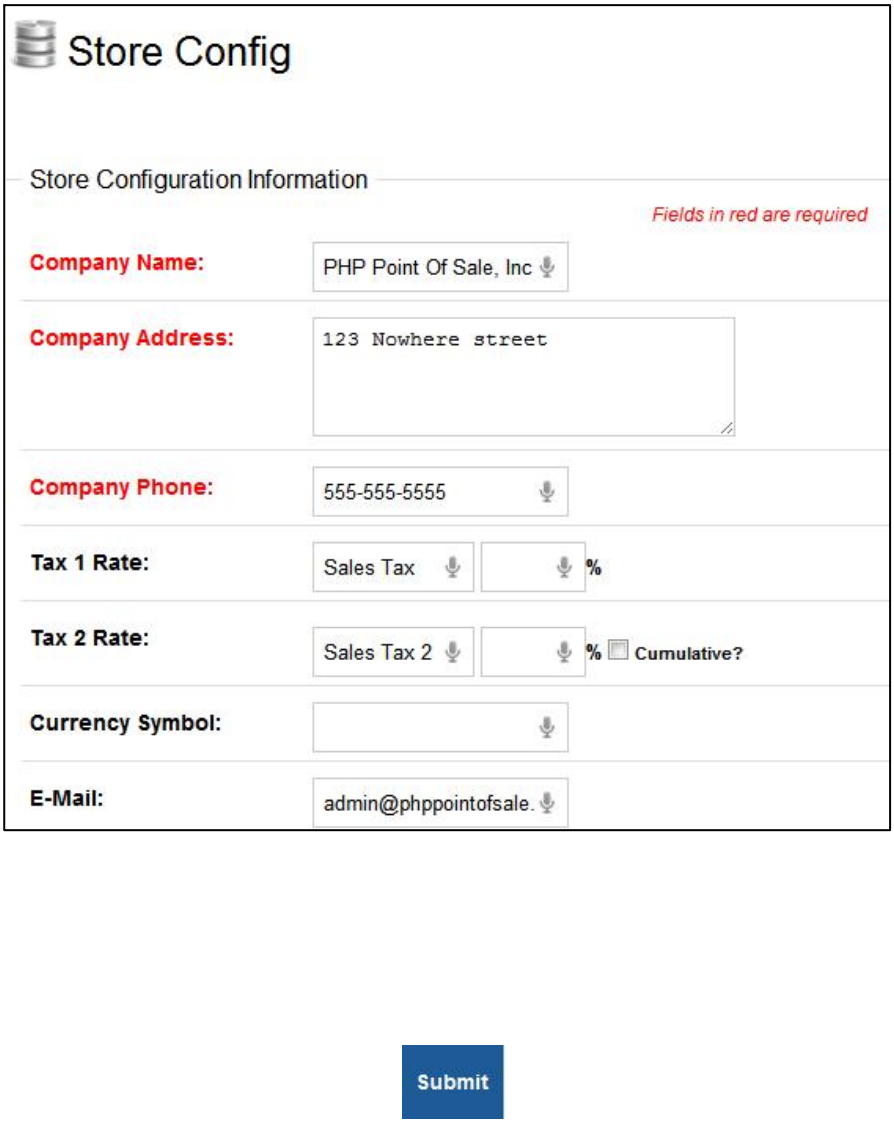
Figure 92 – Sample Barcode

CHAPTER12:

Store Configuration

12 Store Configuration

12.1 Configuring store for the first time



To allow store information to appear in the receipt, a user should configure the store's information in this screen

Figure 93 – Store Configuration Screen

1. Fill in the necessary information **(The fields in red are required)**.
2. Then click the "Submit" button which is in the bottom left of the screen.

Figure 94 – Submit Button

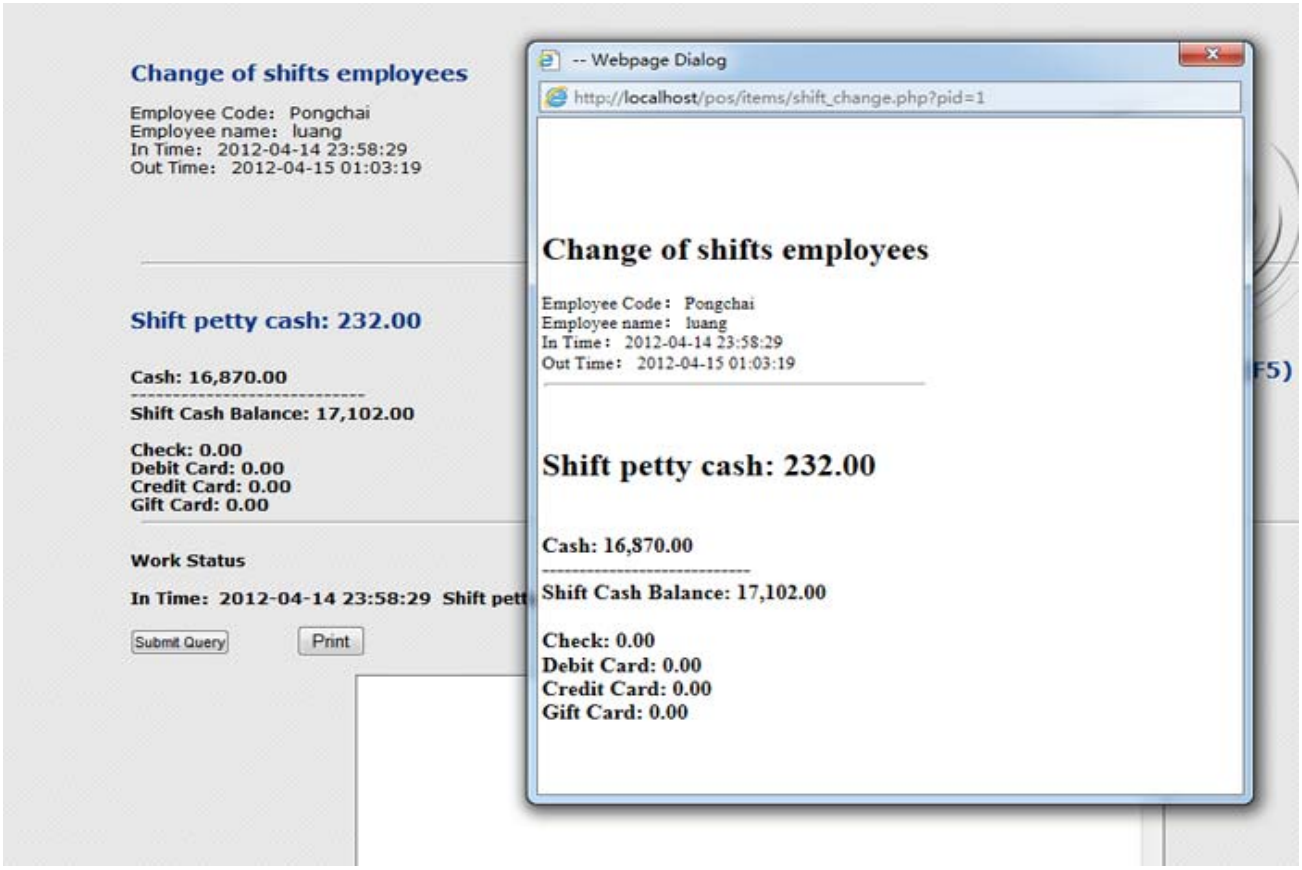
12.2 Backup

1. Click the backup database icon to backup the whole database of the system.

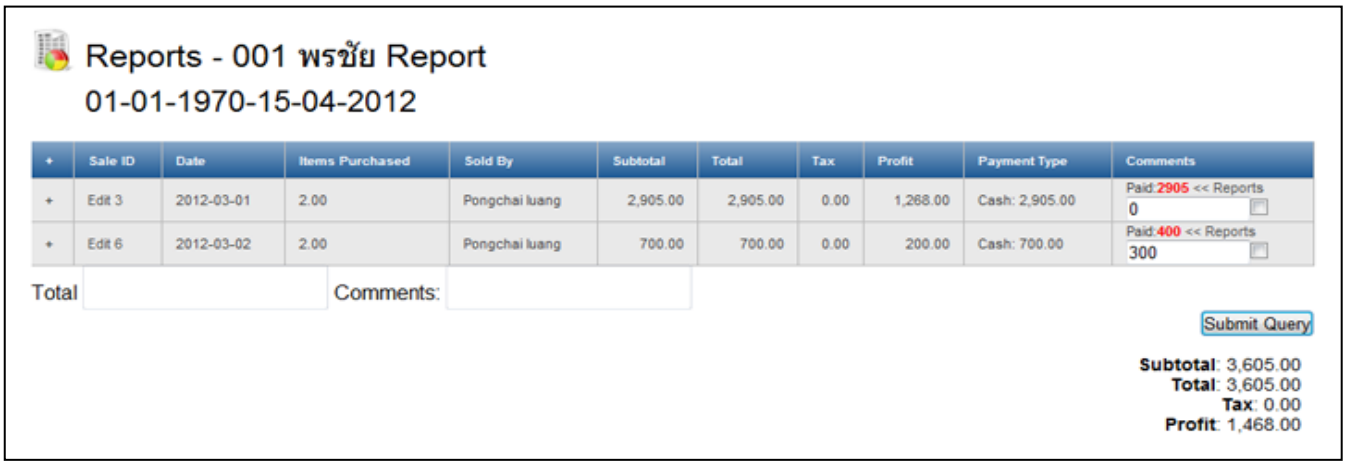
   Recommended to backup every day before closing the system)

Figure 95 – Backup Database Button

12.3 Change Shift



12.4 Customer payment


Reports - 001 พรชัย Report
01-01-1970-15-04-2012
+ Sale ID Date Items Purchased Sold By Subtotal Total Tax Profit Payment Type Comments
+ Edit 3 2012-03-01 2.00 Pongchai luang 2,905.00 2,905.00 0.00 1,268.00 Cash: 2,905.00 Paid:2905 << Reports 0
+ Edit 6 2012-03-02 2.00 Pongchai luang 700.00 700.00 0.00 200.00 Cash: 700.00 Paid:400 << Reports 300
Total
Comments:
Submit Query
Subtotal: 3,605.00
Total: 3,605.00
Tax: 0.00
Profit: 1,468.00

Customers can choose installment every transaction, the system will record the time of each payment and amount.

****

END OF USER MANUAL

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For any updates please visit www.TotalSMEs.com. If you have any inquiries about this user manual, please email to keng@21thai.com.